

Role Title:	Financial Planning and Analysis Manager
Reporting to:	Financial Controller
Direct Reports:	N/A
Salary:	£55,000 – £60,000 per annum
Contract:	9 Month Fixed Term Contract, Full Time
Hours:	35 hours per week, Monday – Friday, 7 hours per day, between the hours of 8am and 6pm (1-hour unpaid lunch)
FTE:	1.0 FTE
Place of Work:	Silsden / Hybrid with a minimum of 2 – 3 days in the office (as agreed with manager)
Benefits:	25 days holiday, plus bank holidays, Company Pension

Ecology's Purpose

In a world that doesn't add up, daring to be different is our calling, lending our power so everyone's story gets a chance to thrive.

Role Purpose

As Financial Planning and Analysis Manager, you will support the provision of insightful Management Information (MI), financial planning, strategic analysis and decision support across the Society. You will be responsible for ensuring high-quality financial reporting, performance analysis, forecasting and planning processes that support effective governance, regulatory compliance and strategic decision-making.

The role will act as the Society's centre of excellence for financial planning, business performance insight, management information, prudential reporting support and financial analytics. The postholder will support budgeting, forecasting, stress-testing, capital planning and scenario analysis processes whilst driving improvements in data quality, reporting automation, regulatory analytics and decision support.

Through robust challenge, commercial insight and strategic recommendations, the role will support the Finance Director, Finance Team and wider business in achieving the Society's strategic objectives.

A key aspect of the role will be the delivery of financial and prudential analysis to support the Society's regulatory and risk management framework. This includes the production, interpretation and presentation of data and analysis to support key prudential documents and submissions, including ICAAP, Recovery Planning, Stress Testing, Capital Planning, Basel 3.1 implementation and other regulatory requirements. The role will work closely with Finance, Risk and business stakeholders to ensure the accuracy, integrity and effective use of financial, risk and operational data, providing analysis and insight that supports sound decision-making and regulatory compliance.

This position is critical to Ecology's ability to establish and deliver its short, medium and long-term strategic objectives. The role will work closely with senior leaders across the organisation to translate strategy into financial plans, monitor performance against key objectives and identify opportunities to

enhance financial and operational outcomes. The postholder will provide financial modelling, scenario analysis and performance insight to support strategic initiatives, business cases and investment decisions.

The successful candidate will combine strong technical expertise with exceptional communication and stakeholder management skills. They will be an accomplished business partner, capable of analysing complex financial, prudential and operational information, communicating insights clearly and influencing decisions at all levels of the organisation.

The role requires a highly analytical, commercially minded and proactive individual who can balance strategic thinking with operational delivery. Vision, energy, enthusiasm and focus are essential, together with the ability to collaborate effectively, build strong relationships and lead continuous improvement across financial planning, reporting, data management, performance analysis and decision-support activities. The postholder will champion best practice in financial analysis, reporting and data governance, ensuring the Society has the information and insight required to make informed, timely and effective decisions.

Main Duties & Areas of Responsibility

Duties and responsibilities include, but are not exclusive to:

Data Analytics & Management Information

- Own the production and continuous enhancement of Executive, Board and Committee MI packs.
- Develop KPI frameworks, performance dashboards and business intelligence reporting.
- Analyse large and complex financial and operational datasets to identify trends, opportunities and emerging risks.
- Lead initiatives to automate reporting processes and improve reporting efficiency.
- Drive data governance, data integrity and management information quality across finance reporting.
- Establish consistent reporting standards and performance metrics across the Society.

Regulatory Reporting & Prudential Analytics

- Oversee the financial analysis supporting regulatory returns, ICAAP, Recovery Planning and resilience assessments.
- Analyse prudential, capital, liquidity and profitability metrics and communicate implications to senior stakeholders.
- Support responses to requests from auditors, regulators and external stakeholders.
- Develop and maintain robust controls, reconciliations and audit trails surrounding key regulatory and management information.

Business Performance & Strategic Analysis

- Lead scenario modelling, sensitivity analysis and stress testing to support strategic decision-making.
- Develop financial models supporting capital allocation, product profitability and commercial opportunities.
- Identify key drivers of business performance and recommend actions to improve financial outcomes.
- Provide insight into balance sheet performance, margin optimisation, capital utilisation and return on capital.
- Support strategic projects including acquisitions, new propositions, business transformation and regulatory change initiatives.
- Champion continuous improvement within Finance and across the wider organisation.
- Provide analysis to enable the business to meet its commercial objectives and strategy, such as product profitability and return on capital.

- Support the groups monthly management reporting process, delivering any requested analysis.

Skills and Experience

Essential Experience

- Fully qualified ACA, ACCA or CIMA.
- Significant experience in FP&A, commercial finance or business partnering roles.
- Experience working within financial services, banking or building societies.
- Advanced financial modelling, forecasting and scenario analysis capabilities.
- Experience producing Management Information (MI) and performance reporting for senior management and Board Committees.
- Experience managing large datasets and interpreting complex financial, prudential and operational information.
- Advanced Excel skills.
- Strong analytical and problem-solving skills.
- Ability to see the bigger picture across the Society whilst maintaining the curiosity to challenge assumptions and investigate underlying drivers.
- Strong understanding of capital, liquidity, profitability and regulatory performance metrics.
- Experience supporting budgeting, forecasting and business planning processes.
- Ability to communicate complex financial information clearly to both financial and non-financial stakeholders.

Desirable

- Experience of working with ALMIS or similar Asset Liability Management systems.
- Knowledge of prudential regulation applicable to building societies and banks.
- Experience supporting ICAAP, Recovery Planning, Stress Testing or Capital Planning processes.
- Experience supporting Basel 3.1 implementation or other regulatory change programmes.
- Experience using reporting and visualisation tools such as Power BI.
- Experience of regulatory reporting and prudential analytics.
- Understanding of treasury, balance sheet management and asset liability management principles.

Leadership & Influencing

- Proven ability to challenge constructively and influence senior stakeholders.
- Strong business partnering experience with Executive and operational leadership teams.
- Demonstrated ability to translate complex financial and prudential analysis into clear and actionable recommendations.
- Experience supporting strategic decision-making through high-quality analysis and insight.
- Ability to build strong relationships across Finance, Risk and the wider business.
- Confident presenting financial information and recommendations to senior management and Board Committees.
- Proactive, collaborative and focused on continuous improvement.

Personal Attributes

- Curious, analytical and commercially minded.
- Strong attention to detail whilst maintaining a strategic perspective.
- Self-motivated with the ability to work independently and collaboratively.
- Resilient and adaptable in a changing environment.
- Passionate about using data and insight to support better decision-making.
- Committed to Ecology's values and purpose-driven approach to financial services.

Other

- You have a legal duty to take reasonable care of your own health and safety and that of others and you are expected to be familiar with, and adhere to Ecology's Health and Safety Policy
- Ensure your work, communication and approach conforms to the values and behaviours of the Society.
- Keep up to date, and comply with Ecology's rules, Policies and Procedures.
- Undertake any reasonable duties requested by management.
- This role has a six-month probation period
- As part of your role, you are responsible for upholding the principles of Consumer Duty by ensuring that the needs, preferences, and interests of members are at the forefront of decision-making, delivering fair outcomes, and acting in a way that promotes member trust and confidence

Acceptance

Print Name: _____

Signature: _____

Date: _____

Behaviours and Values

Behaviour	Our Collective Commitments	Examples of Bringing My Best Self to Work
Deliver Together	We've always believed that, together we can achieve more. Working with our stakeholders and Members to create incredible impact. That's why Deliver Together is the heartbeat of everything we do. By combining our unique strengths, perspectives, and talents, we know there is no challenge too great, no goal too ambitious. Together, we're unstoppable. Deliver Together means learning from one another, recognising that every person brings something valuable to the table. We know the best solutions emerge when we combine our insights, learn from our differences, and respect each other's expertise. When we Deliver Together, we tackle challenges as a united front, sharing our successes, learning from our setbacks, and always supporting each other to be better. Creating something that's greater than the sum of our parts. Let's Deliver Together. Because together, we can achieve the extraordinary.	• I collaborate with others, considering the bigger picture and doing the right thing for Ecology and our Members • I deliver on our collective commitments, providing amazing service to our Members, and to my fellow colleagues • I am purposeful in my actions, respecting people's time and using it wisely • I choose the right communication tools and methods to align with the goals, complexity, and urgency of the activity • I evaluate the strengths of the team, ensuring that the right individuals are involved • I welcome diverse perspectives and encourage inclusivity
Lead With Care	At Ecology we care deeply about our planet, the people we work with and the Members we serve. Lead With Care means being honest and supportive - the cornerstones of strong relationships and lasting success. It's about being authentic, patient, compassionate and understanding. It's appreciating that everyone's journey is unique and taking time to encourage, uplift and help each other. We recognise the power of words and the responsibility we carry when we communicate, offering feedback that is constructive and kind – and always keeping the well-being of others in mind. We share our thoughts clearly and respectfully, without fear of judgment. To Lead With Care is to embrace openness with courage, even when it's difficult, knowing that honesty drives meaningful change that makes a difference. Let's Lead With Care. In every action, every word, and every step we take.	• I am kind to myself, asking for help when needed • I build trust through consistency and reliability • I help when needed, stepping in with a willingness to support • I share truth with care, offering feedback that is constructive and kind, and delivering it in a way that helps others grow, without judgment or blame • I am mindful of how my actions, decisions, and communication affect people and our planet • I actively listen and seek to understand the needs of others, being present in the moment • I celebrate successes, offering thanks and praise for a job well done
Values		
Fairness: Treating everyone individually and with respect	Openness: Listening to each other's views and opinions	Responsibility: Doing what we say we'll do. Making pragmatic decisions, staying true to our values
		Co-operation: Working together, receptive to the knowledge and opinions of others
		Activism: Empowering colleagues to be advocates for change

Behaviour		Our Collective Commitments		Examples of Bringing My Best Self to Work	
Own Your Impact		At Ecology, we make an incredible impact on our environment and the communities around us. And we all play a part in making this happen. Own Your Impact is a promise to ourselves to take full ownership of our actions, our commitments, and the outcomes we create. It means delivering on our promises and taking accountability for the results we achieve. To Own Your Impact is to make considered decisions, even when the path isn't easy. It's about achieving a high standard of excellence and recognising that our individual actions contribute to the collective success of our team. We do what we say we will – and we do it to the best of our ability. Own Your Impact means being proactive by anticipating challenges, taking the initiative to find solutions, and owning the process from start to finish. We lead by example, knowing that true accountability means creating positive impact that drives the right results. Let's Own Our Impact. Let's be accountable for our actions and for our future.		• I take ownership of my performance and development, achieving my objectives and building the skills I need for future success • I own the process from start to finish, taking responsibility for every step • I have clarity over my role and know what's expected of me • I do what I say I will, managing stakeholder expectations with clear communication and deadlines • I consider risks carefully, seeking feedback to guide my path and being mindful of possible outcomes. • I embrace feedback and use it to improve, seeking opportunities to learn from others • I am self-aware, reflecting on my own actions and impact, and I believe in my own abilities	
Dare To Be Different		Ecology started from a brave decision to do something that others wouldn't. Pioneer the possible. Dare To Be Different means stepping into the unknown with confidence, challenging the status quo, taking considered risks that may lead to incredible impact. It's about having the courage to voice new ideas, even when they seem bold or unconventional. To Dare To Be Different means making tough decisions, when others won't, and being brave enough to change course if it's the right thing to do. We are strong enough to own our mistakes, being resilient in the face of setbacks. We embrace failure, seeing it is a stepping stone to success, sharing what we learn to help each other. We lead with confidence to inspire others to greatness. Let's Dare To Be Different. Let's inspire the world around us.		• I speak up and challenge respectfully, with a focus on finding solutions • I'm positive and inspiring, strong in the face of adversity and resilient when facing setbacks • I don't let fear or disappointment derail my efforts • I'm brave enough to step out of my comfort zone, challenging the status quo to achieve the right results • I lead with humility, accepting my mistakes, listening to others, and being brave enough to change course when it's the right thing to do • I champion sustainability, pushing for positive change so we can create a better world	
Values					
Fairness: Treating everyone individually and with respect		Openness: Listening to each other's views and opinions		Responsibility: Doing what we say we'll do. Making pragmatic decisions, staying true to our values	
				Co-operation: Working together, receptive to the knowledge and opinions of others	
				Activism: Empowering colleagues to be advocates for change	